

REFRAMING PROCESS

Assembling Your Intro Kit

How to create your introduction kit:

Print, review and customize as needed the resources for the Introduction Kit:

Kit 1 –Card

Kit 2 –Client Letter

Kit 3 – An Introduction to Our Team

Kit 4 – Advisor Biography

Kit 5 – Our Partnership with You

Kit 6 – Our Partnership with [Firm]

The Introduction Kit is a key part of how you educate your Prospects, Existing Clients and Strategic Alliances. The contents of your Introduction Kit would be the same for each of these target audiences – the only thing that would change is the “Cover Letter” accompanying the kit to ensure it is appropriately referenced and framed.

- Prospective Client Cover Letter
- Existing Client Cover Letter
- Strategic Alliance Cover Letter

Branding

Your Introduction Kit should be consistent with all other marketing materials you have, including your website (if you have one). Pay careful attention to branding, formatting and language. Everything should look like it fits together and the content has to be consistent.

Compliance

Your Introduction Kit must be approved by marketing/compliance prior to use with your clients.



What Not To Include

Do not include sales material and/or product brochures in your Introduction Kit. If you lead with product, you are following the Sales Model and are on the road to gaining a customer. If you lead with process and people, you are following the Professional Model and are on the road to attracting a client – who will become an advocate. Avoid the temptation to ‘tuck in’ the readily available product pamphlets – this is definitely a case where less is more.

What To Include

Place all items in the right side of your pocket folder; this is prime real estate.

- Client Letter
- An Introduction to Our Team
- Advisor Bio-a good bio gives education and credentials with a significant emphasis on personal items that clients will connect with including: Hobbies, Nonprofits, Pets and Family
- Our Partnership with You
- Our Partnership with XYZ Firm

Once you have completed the folder:

- Attach with a paper clip to the folder a stunning, handwritten greeting card, (use a quality card, such as those provided by Lavishcards.com).
- Next, place the folder and card in a large white envelope (only the person's first and last name appear on the envelope, FedEx/UPS will generate an address label).
- Send UPS or FedEx second day, this is how Professionals send important documents. You want it to arrive in the same condition you sent it, and with general postal delivery there is no guarantee this will be the case.



Package Arrives

The first thing a person receiving this courier delivery thinks will be “this must be important”.

Most people will look at the information in the folder and place it in a drawer, but the card will go on the desk or refrigerator as a reminder of the upcoming appointment, this begins to anchor the relationship.

This is what we call from Vapor to Paper- a person holds the objects in their hands, it is tangible evidence of your professionalism versus an email or text message.

Special Note: Pareto Systems does not recommend sending out an Introduction Kit unless someone has given you expressed permission to do so (i.e. we don't rapid fire this out unsolicited). This information is intended for those who have expressed an interest in knowing more about your practice. In other words, they want to know more about you, your team and your approach.

